



Sandata

Get more right from the start

Sandata EVV Data Entry Review

Intended Audience: Agency Providers and Non-Agency Providers

NOTE: This webinar will begin 5 minutes after the start time.

Developed August 2021

Sound Test



We are testing sound at this time.

If you cannot hear the sound test, please check the volume on your speakers or listening device.

If you continue to have problems, a recorded webinar will be placed on the Ohio Department of Medicaid's website

Agenda

- Terms and Definitions
- Complete a Client Record in Sandata EVV
- Complete an Employee Record in Sandata EVV
- Modify Records
- Data Entry and Exception Handling
- Resources
- Questions

Terms and Definitions

Terms and Definitions

Data Entry: the process of creating and managing client, employee, and user records in Sandata Electronic Visit Verification (EVV)

Agency Provider: An entity that provides care to an individual, and records services using Electronic Visit Verification

Non-Agency Provider: An independent provider who provides care to an individual, and records services using EVV



Terms and Definitions

Client: An individual who receives EVV eligible services

Employee: A person who is employed by an agency provider to provide care to one or more clients (individuals)

User: A person with a unique login and password to the Sandata EVV portal

Terms and Definitions

Sandata EVV Portal: the online portal used by agency and non-agency providers to manage Sandata EVV visits and records

Sandata Mobile Connect: Sandata's mobile visit verification option; an application that can be downloaded onto a personal smart device or run on an Sandata EVV device

Exception: Missing or inaccurate visit information in the Sandata EVV portal

Terms and Definitions

Sandata Client ID: the number used to identify an individual during call in and call out

- This is created automatically when the client record is saved in Sandata EVV
- Each individual has a unique client ID

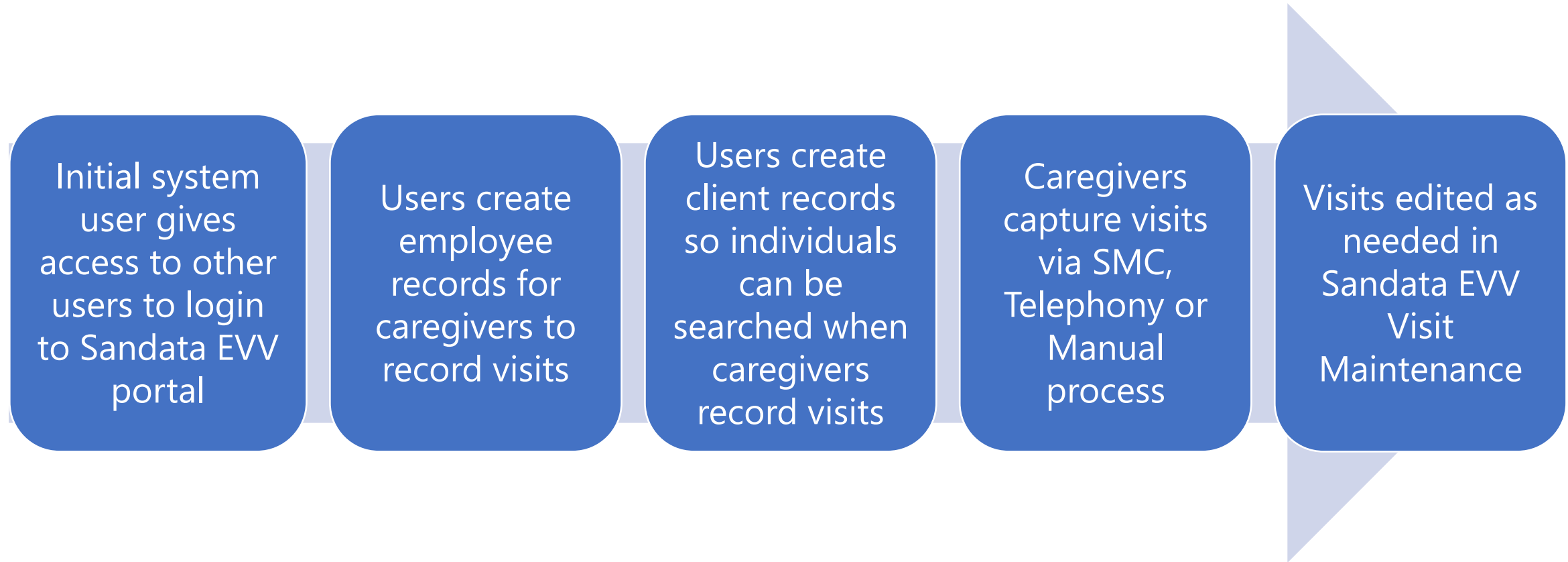
Santrax ID: the number used to identify an agency employee or non-agency provider during a Telephony call

- Agency providers – this ID is created automatically when the employee record is saved in Sandata EVV
- Non-Agency providers – this ID is created automatically when training is completed, and can be found in your Welcome Kit Call Reference Guide

Data Entry Process – Non-Agency Providers



Data Entry Process – Agency Providers



Complete a Client Record in Sandata EVV

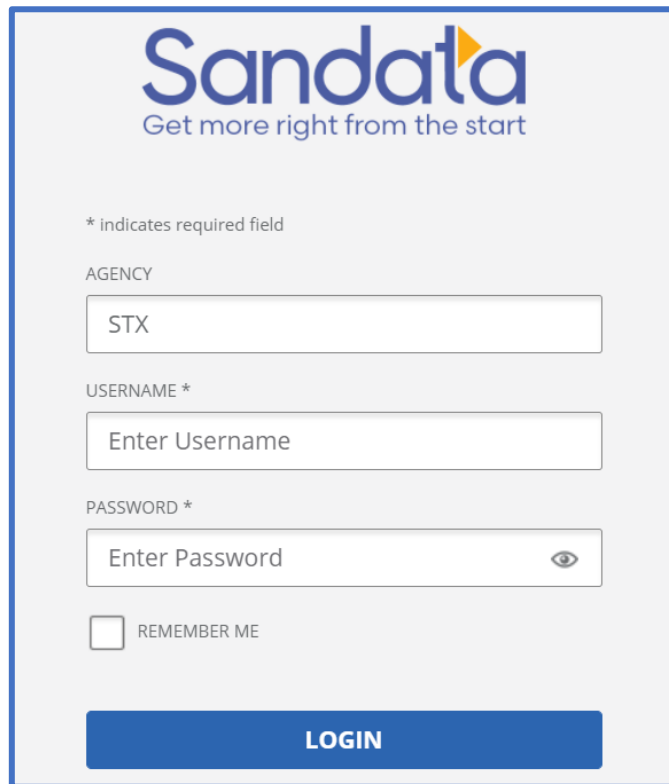
Complete a Client Record in Sandata EVV

The client record must be completed first, before the individual can be:

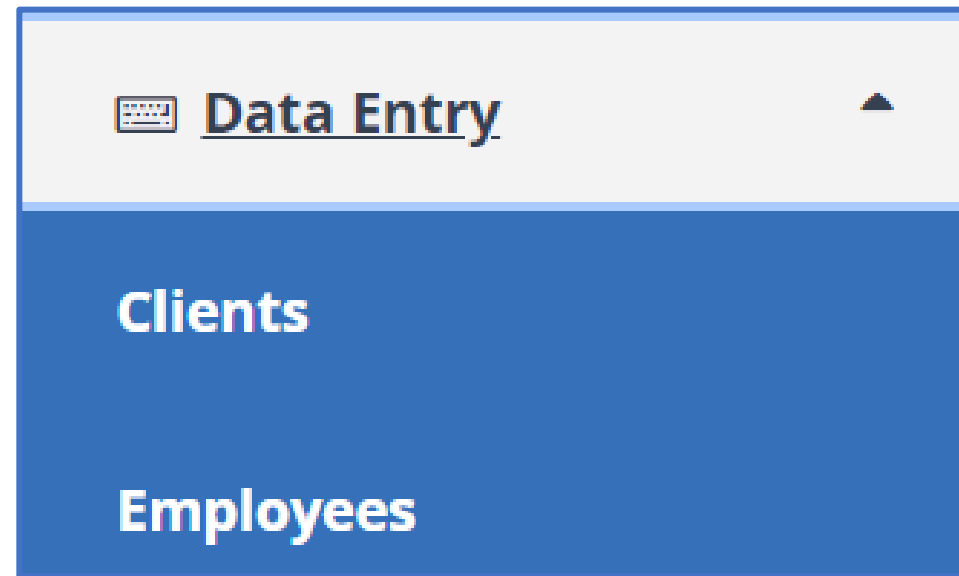
- Searched when visits are recorded in the SMC application
- Identified during a Telephony call
- Added to a manually entered visit in Sandata EVV

Complete a Client Record in Sandata EVV

Login to Sandata EVV, then click **Data Entry > Clients**



The Sandata login form features the Sandata logo at the top with the tagline "Get more right from the start". Below the logo, a note states "* indicates required field". The form includes three input fields: "AGENCY" with "STX" entered, "USERNAME *" with the placeholder "Enter Username", and "PASSWORD *" with the placeholder "Enter Password" and a toggle icon. A "REMEMBER ME" checkbox is located below the password field. A blue "LOGIN" button is at the bottom.



Complete a Client Record in Sandata EVV

Click **Create Client** in the upper right-hand corner of the screen

Search Clients

CREATE CLIENT

CLIENT LAST NAME

Enter Client Last Name

CLIENT FIRST NAME

Enter Client First Name

CLIENT ID

Enter Client ID

CLIENT MEDICAID ID

Enter Client Medicaid ID

STATUS

Active

Q SEARCH

CLEAR

Complete a Client Record in Sandata EVV

In the Basic section,
complete all fields that are
marked as required

If a field does not have an
asterisk (*), it is not
necessary to complete and
can be left blank

Basic

* indicates required field

FIRST NAME *	LAST NAME *	MIDDLE INITIAL
<input type="text" value="Enter First Name"/>	<input type="text" value="Enter Last Name"/>	<input type="text" value="Enter Middle Initial"/>
CLIENT ID *	MEDICAID ID *	ALTERNATE MEDICAID ID
<input type="text" value="Enter Client ID"/>	<input type="text" value="Enter Medicaid ID"/>	<input type="text" value="Enter Alternate Medicaid"/>
CLIENT OTHER ID	SUPERVISOR	GENDER
<input type="text" value="Enter Client Other ID"/>	<input type="text" value="All"/>	<input type="text" value="Select Gender"/>
LANGUAGE PREFERENCE *	TIME ZONE	EMAIL ADDRESS
<input type="text" value="English"/>	<input type="text" value="US/Eastern"/>	<input type="text" value="Enter Client Email Address"/>
SOCIAL SECURITY # 000-00-0000	<input type="checkbox"/> NEWBORN	
<input type="text" value="Enter Social Security #"/>		

Complete a Client Record in Sandata EVV

In the Client Payer section, click **Add New**

Client Payer

Add New

History

No Data Found!

Complete a Client Record in Sandata EVV

Select the payer, program, and service for the client, select the start date, click **ADD**, then click the (x) to close out the payer popup

- Click [here](#) for a full list of EVV services
- If the Medicaid ID is pending and the individual has a PIMS ID, enter the PIMS ID in the Client Payer ID field – click [here](#) for video instructions

The screenshot shows a web form titled "Add/Edit Payer" with a close button (X) in the top right corner. The form is divided into two main sections. The top section contains four fields: "CLIENT NAME", "CLIENT ID #", "MEDICAID ID #", and "SUPERVISOR", each with a "None" value. Below this is a note: "* indicates required field". The bottom section contains three dropdown menus: "PAYER *" (with "Select Payer" as the selected option), "PROGRAM *" (with "Select Program" as the selected option), and "SERVICE *" (with "Select Service" as the selected option). Below these are three input fields: "CLIENT PAYER ID" (with "Enter Client Payer Id" as the placeholder), "FROM DATE * MM/DD/YYYY" (with "Select From Date" and a calendar icon), and "TO DATE MM/DD/YYYY" (with "Select To Date" and a calendar icon). At the bottom right are two buttons: "CANCEL" and "ADD".

Complete a Client Record in Sandata EVV

Each unique payer, program, and service combination must be added to the client record (for example, if a client receives LPN and RN services)



Use the Add New button, or use the copy icon to copy the current details

- The copy function can be helpful if only the services are different

Client Payer

Add New

History

FROM DATE	TO DATE	CLIENT PAYER ID	PAYER	PROGRAM	SERVICE	ACTIONS
08/01/2021			ODM	SP	SPHH Aide (G0156)	 

Showing 1 to 1 of 1 entries

«

<

1

>

»

Complete a Client Record in Sandata EVV

Add the client's primary address(es), where services are typically provided

- To enter more than one address, click **View/Add Additional Addresses** and select the appropriate address type

Primary Address

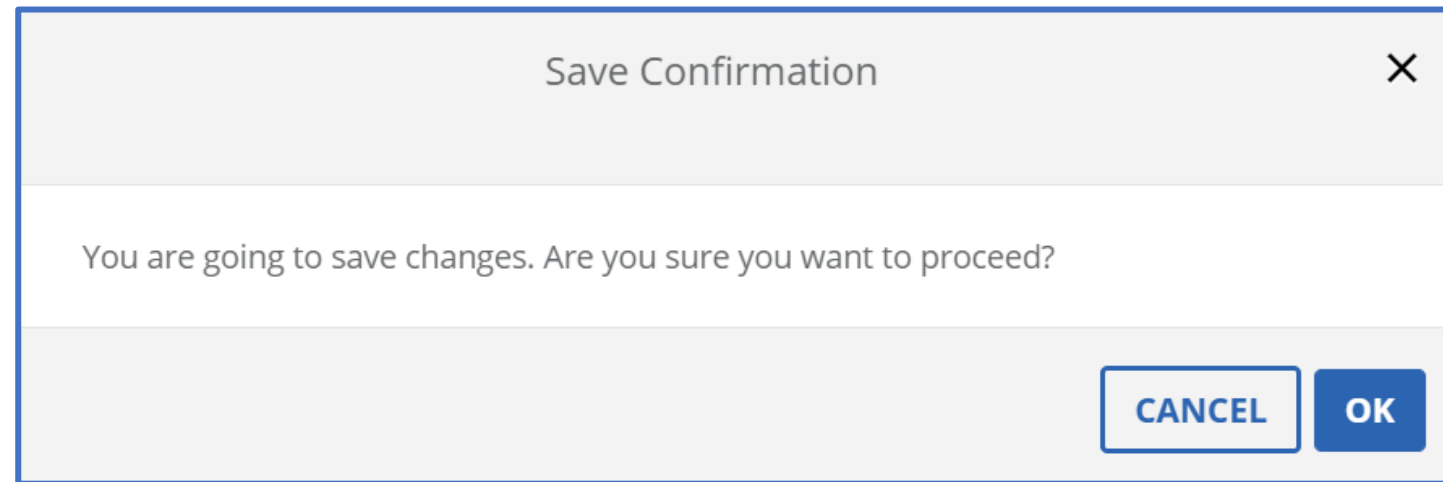
* indicates required field

ADDRESS TYPE *	ADDRESS LINE 1 *	ADDRESS LINE 2	
<input type="text" value="Select Address Type"/>	<input type="text" value="Enter Address Line 1"/>	<input type="text" value="Enter Address Line 2"/>	
CITY *	COUNTY	STATE *	ZIP CODE * 00000-0000
<input type="text" value="Enter City"/>	<input type="text" value="Enter County"/>	<input type="text" value="Select"/>	<input type="text" value="Enter Zip Code"/>

View/Add Additional Address

Complete a Client Record in Sandata EVV

Click **Save**, then on the confirmation screen, click **OK**



Complete an Employee Record in Sandata EVV

Note: Agency providers will need to create employee records in Sandata EVV. For independent providers, the record is generated by Sandata at the time of account creation. Slides 21 to 27, and all following employee record slides apply to Agency providers.

Complete an Employee Record in Sandata EVV

The employee record must be completed for the employee to be able to:

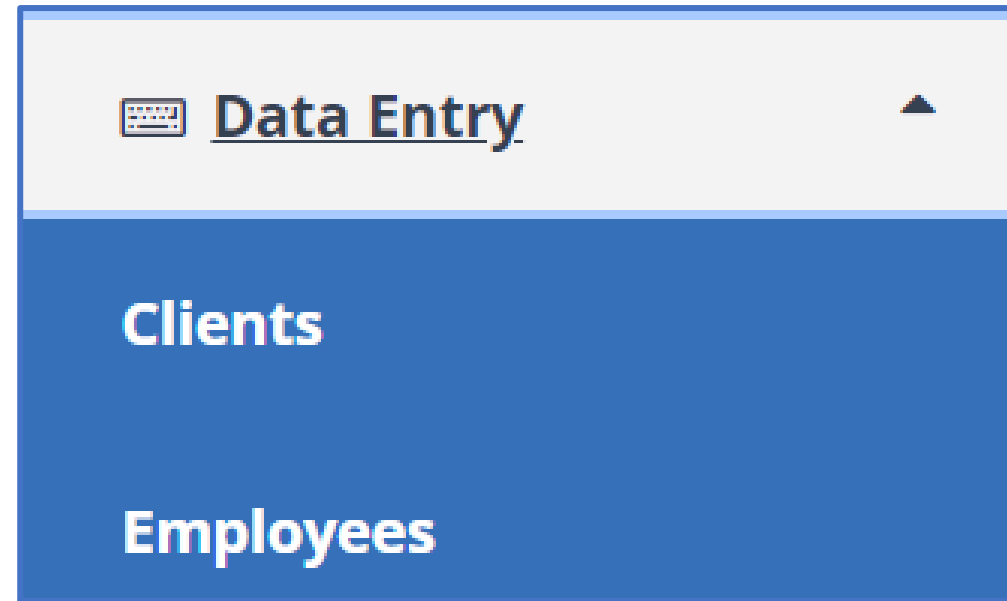
- Sign into the SMC application
- Identify themselves during a Telephony call
- Be added to a manually entered visit in Sandata EVV

Complete an Employee Record in Sandata EVV

Login to Sandata EVV, then click **Data Entry > Employees**



The login form for Sandata EVV. It features the Sandata logo at the top with the tagline "Get more right from the start". Below the logo, a note states "* indicates required field". The form includes three input fields: "AGENCY" with the value "STX", "USERNAME *" with the placeholder "Enter Username", and "PASSWORD *" with the placeholder "Enter Password" and a toggle eye icon. A "REMEMBER ME" checkbox is located below the password field. At the bottom is a blue "LOGIN" button.



Complete an Employee Record in Sandata EVV

Click **Create Employee** in the upper right-hand corner of the screen

Search Employees

CREATE EMPLOYEE

EMPLOYEE LAST NAME

Enter Employee Last Name

EMPLOYEE FIRST NAME

Enter Employee First Name

EMPLOYEE ID

Enter Employee ID

SOCIAL SECURITY # 000-00-0000

Enter Social Security #

STATUS

Active

Q SEARCH

CLEAR

Complete an Employee Record in Sandata EVV

In the **Basic** section,
complete all fields that are
marked as required

If a field does not have an
asterisk (*), it is not
necessary to complete and
can be left blank

Basic

* indicates required field

FIRST NAME *

Enter First Name

LAST NAME *

Enter Last Name

MIDDLE INITIAL

Enter M

EMPLOYEE ID

Enter Employee ID

EMPLOYEE OTHER ID

Enter Employee Other ID

SOCIAL SECURITY # * 000-00-0000

Enter Social Security #

SANTRAX ID

Enter Santrax ID

EMAIL ADDRESS * NOT CASE SENSITIVE

Enter Email Address

CONFIRMATION EMAIL ADDRESS * NOT CASE SENSITIVE

Enter Confirmation Email Address

Complete an Employee Record in Sandata EVV

In the Employment section, check the **Mobile User** box for the employee to record a visit with SMC

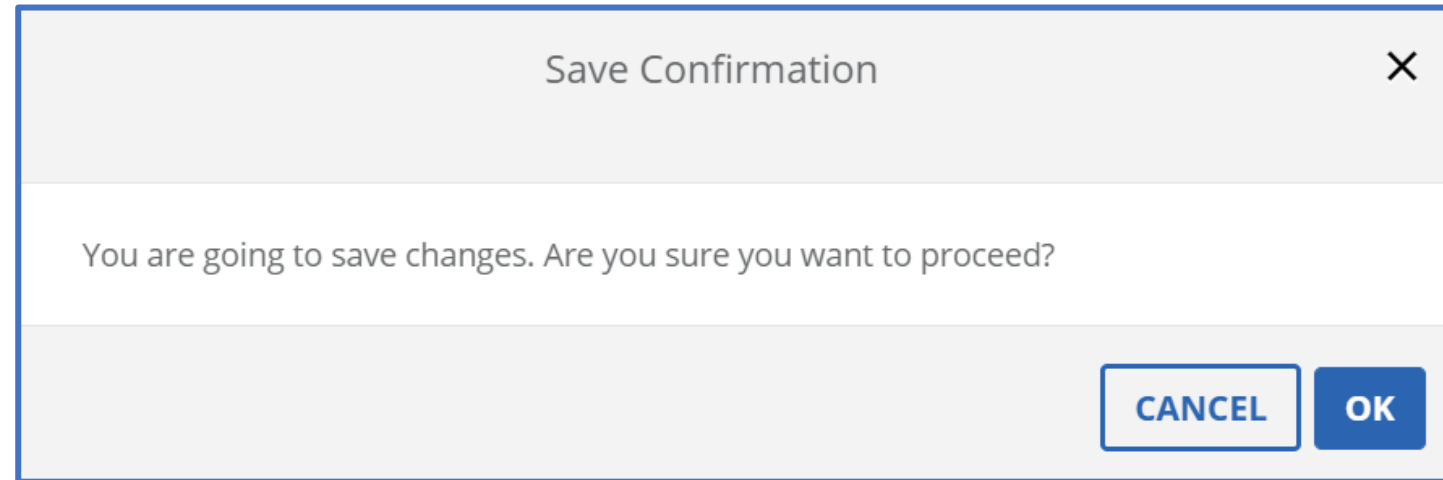
- If this box is not checked, the employee cannot use SMC because the application will not recognize/link the email address

Employment

DEPARTMENT	DISCIPLINE
Select Depart ▼	Select Discipli ▼
EMPLOYEE CUSTOM ID	PAY RATE
Enter Employee€	Enter Pay Rate
HIRE DATE MM/DD/YYYY	TO DATE MM/DD/YYYY
Select Hire Date📅	Select To Date📅
<input type="checkbox"/> MOBILE USER	

Complete an Employee Record in Sandata EVV

Click **Save**, then on the confirmation screen, click **OK**



Modify Records

Modify Client or Employee Records – Examples

It may be necessary to modify a client record or an employee record after it has been created, for example if:

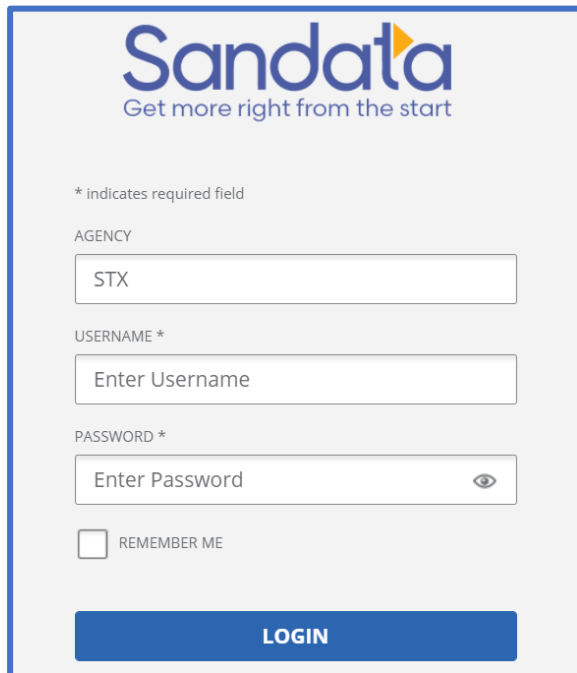
- A client has a new payer, program, or service that requires EVV support
- A client has moved and has a new address
- A client has an alternate Medicaid ID number that needs to be added to their record

Modify Client or Employee Records – Examples

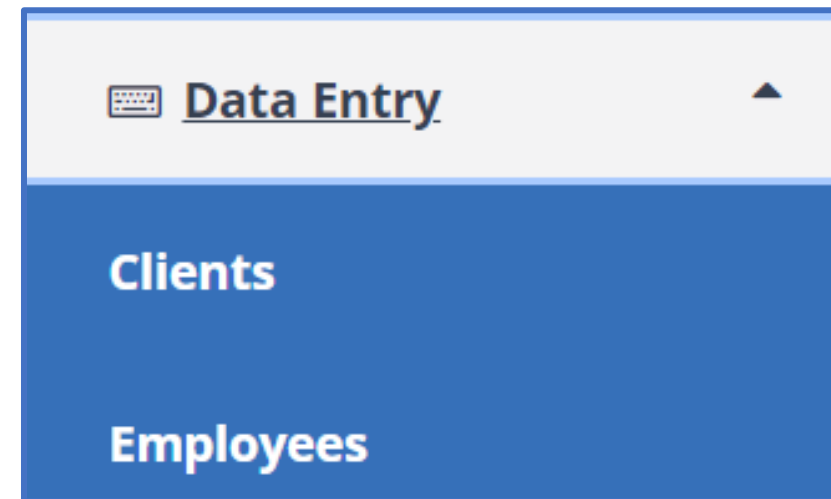
- A client begins EVV services with a PIMS ID or MC identifier, and now has an individual Medicaid ID number
- An employee has a new email address that they would like to use for Sandata Mobile Connect
- A phone number is added to a client record, to clear the unmatched client/phone ID exception
 - NOTE: The provider will still need to identify themselves on the call, using their Santrax ID number

Modify a Client Record

Login to Sandata EVV, then click **Data Entry > Clients**



The Sandata login form features the company logo at the top with the tagline "Get more right from the start". Below the logo, a note states "* indicates required field". The form includes three input fields: "AGENCY" with the value "STX", "USERNAME *" with the placeholder "Enter Username", and "PASSWORD *" with the placeholder "Enter Password" and a toggle icon. A "REMEMBER ME" checkbox is located below the password field. A blue "LOGIN" button is positioned at the bottom of the form.





Modify a Client Record

Use the search fields to locate the client record, then click the pencil icon next to the client's name

ROWS PER PAGE: 20

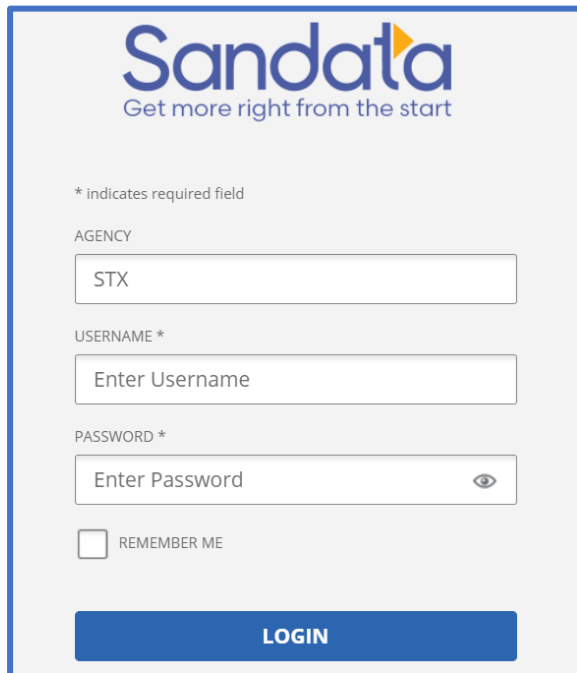
Showing 1 to 1 of 1 entries

Last Name	First Name	Client ID	Client Medicaid ID	Status	Actions
Smith	Nicholas	807074	123456789098	Active	 

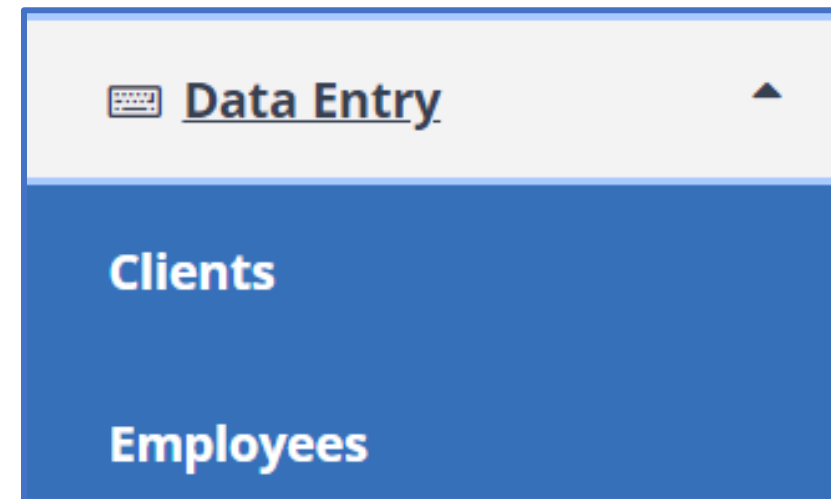
Showing 1 to 1 of 1 entries

Modify an Employee Record

Login to Sandata EVV, then click **Data Entry > Employees**



The Sandata login form features the company logo at the top with the tagline "Get more right from the start". Below the logo, a note states "* indicates required field". The form includes three input fields: "AGENCY" with the value "STX", "USERNAME *" with the placeholder "Enter Username", and "PASSWORD *" with the placeholder "Enter Password" and a toggle icon. A "REMEMBER ME" checkbox is located below the password field. A blue "LOGIN" button is positioned at the bottom of the form.





Modify an Employee Record

Use the search fields to locate the employee record, then click the pencil icon next to the employee's name

ROWS PER PAGE: 20 ▾

Showing 1 to 1 of 1 entries

«	<	1	>	»	
Last Name	First Name	Employee ID	Social Security #	Status	Actions
Doe	John		***-**-6876	Active	<div><div></div><div></div></div>
«	<	1	>	»	
Showing 1 to 1 of 1 entries					

Data Entry and Exception Handling

Data Entry and Exception Handling

Sandata EVV records can be used to resolve visit exceptions, including:

- Unknown Client – There is no individual record information connected to the visit
- Unknown Employee – There is no caregiver record information connected to the visit
- Missing/Unauthorized Service – There is no service on the visit, or the service on the visit does not match the client record

Unknown Client

1. In Sandata EVV Visit Maintenance, click on the visit to open the visit details popup, then click **Client**
2. Use one or more fields to search for the client record
3. Click the radio button next to the client record that you would like to add to the visit.
4. Enter a reason code, resolution code, and reason note (if required)
5. Click **Save**



Unknown Client

In Sandata EVV Visit Maintenance, click on the visit to open the visit details popup, then click **Client**

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Home	Adjusted In	Adjusted Out	Adjusted Home	Bill Home	Visit Status
	Thomas, Jackson	Passport - Consumer Directed Personal Care (T1019) 	01/04/2021	12:15 PM	12:20 PM						ete

Visit Details

Visit From Date: 01/04/2021

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
			Thomas, Jackson	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

No Client has been assigned to this visit.

Find Client

LAST NAME

Enter Last Name

FIRST NAME

Enter First Name

CLIENT ID #

Enter Client ID #

CLIENT MEDICAID ID

Enter Client Medicaid ID

☐ INCLUDE INACTIVE CLIENTS

Q



Unknown Client

Use one or more fields to search for the client record

Find Client

LAST NAME	FIRST NAME	CLIENT ID #
<input type="text" value="Doe"/>	<input type="text" value="Enter First Name"/>	<input type="text" value="Enter Client ID #"/>
CLIENT MEDICAID ID		
<input type="text" value="Enter Client Medicaid ID"/>	<input type="checkbox"/> INCLUDE INACTIVE CLIENTS	<input type="button" value="Q"/>

NOTE: You may also leave these fields blank and click **Search** to see a list of all clients in your EVV portal



Unknown Client

Click the radio button next to the client record that you would like to add to the visit

Actions	Last Name	First Name	Client ID #	Primary Phone #	Client Medicaid ID
<input checked="" type="radio"/>	Doe	Thomas	140112		888928392839

Showing 1 to 1 of 1 entries

«<1>»

Unknown Client

Enter a reason code, resolution code, and reason note (if required), then click **Save**

REASON CODE *	RESOLUTION CODE *	REASON NOTE	SAVE
30 Device Issue ▼	Written Docume ▼	Reason Note	

Unknown Employee

1. In Sandata EVV Visit Maintenance, click on the visit to open the visit details popup, then click **Employee**
2. Use one or more fields to search for the employee record
3. Click the radio button next to the employee record that you would like to add to the visit
4. Enter a reason code, resolution code, and reason note (if required).
5. Click **Save**



Unknown Employee

In Sandata EVV Visit Maintenance, click on the visit to open the visit details popup, then click **Employee**

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call	Adjusted	Adjusted	Adjusted	Bill	Visit
Client, JT			07/21/2021	03:54 PM							

Visit Details

Visit From Date: 07/21/2021

CLIENT NAME

Client, JT

CLIENT ID #

776249

MEDICAID ID #

222211111111

EMPLOYEE NAME

EMPLOYEE ID #

GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

No Employee has been associated with this visit.

Find Employee

LAST NAME

First Name

EMPLOYEE ID #

DISCIPLINE

Last Name

First Name

Employee ID #

Select Discipline

☐ INCLUDE INACTIVE EMPLOYEE

Q



Unknown Employee

Use one or more fields to search for the employee record

Find Employee

LAST NAME	FIRST NAME	EMPLOYEE ID #	DISCIPLINE
<input type="text" value="Thomas"/>	<input type="text" value="First Name"/>	<input type="text" value="Employee ID #"/>	<input type="text" value="Select Discipline"/>

☐ INCLUDE INACTIVE EMPLOYEE

Q

NOTE: You may also leave these fields blank and click **Search** to see a list of all employees in your EVV portal.

Unknown Employee

Click the radio button next to the employee record that you would like to add to the visit

Actions	Last Name	First Name	Employee ID	Santrax ID	Discipline
<input checked="" type="radio"/>	Thomas	Jackson		000447351	

Showing 1 to 1 of 1 entries

«<1>»

Unknown Employee

Enter a reason code, resolution code, and reason note (if required), then click **Save**

REASON CODE *	RESOLUTION CODE *	REASON NOTE	SAVE
30 Device Issue ▼	Written Docume ▼	Reason Note	

Missing or Unauthorized Service

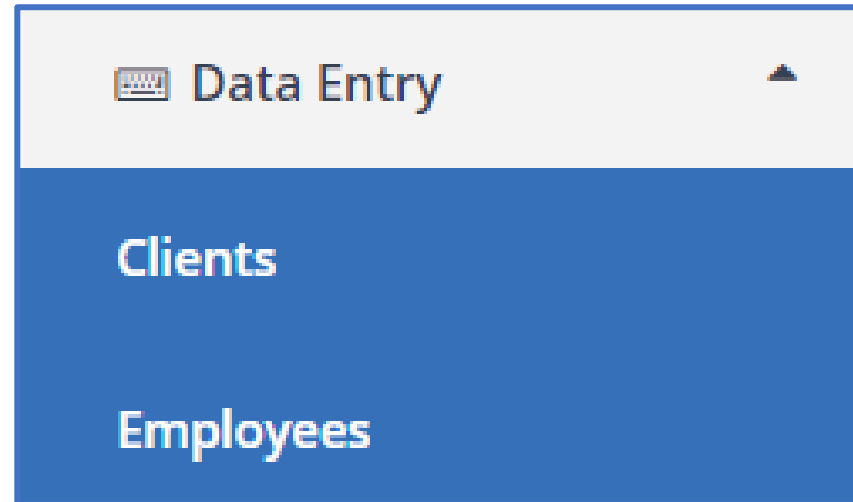
1. On the navigation panel, click **Data Entry**, then click **Clients**
2. Search for the client record, then click the pencil icon next to the client's name to open the record details
3. Note the payer, program, and service in the client record, or add if the data does not exist, and save the client record if changes were made

Missing or Unauthorized Service

4. On the navigation panel, click **Visit Maintenance**, locate the visit, open the visit details, then click **General**
5. Modify the payer, program, and service to match the client record, enter a reason code, resolution code, and reason note (if required), then click **Save**

Missing or Unauthorized Service

On the navigation panel, click **Data Entry**, then click **Clients**



Missing or Unauthorized Service

Search for the client record, then click the pencil icon next to the client's name to open the record details

Search Clients

CREATE CLIENT

CLIENT LAST NAME

Enter Client Last Name

CLIENT FIRST NAME

thomas

CLIENT ID

Enter Client ID

CLIENT MEDICAID ID

Enter Client Medicaid ID

STATUS



Active

Q SEARCH

CLEAR

ROWS PER PAGE: 20

Showing 1 to 1 of 1 entries

Last Name	First Name	Client ID	Client Medicaid ID	Status	Actions
Doe	Thomas	140112	888928392839	Active	 



Missing or Unauthorized Service

Note the payer, program, and service in the client record, or add if the data does not exist, and save the client record if changes were made

Client Payer

Add New

History

FROM DATE	TO DATE	CLIENT PAYER ID	PAYER	PROGRAM	SERVICE	ACTIONS
02/22/2021			DODD	DD	HPC	 

Showing 1 to 1 of 1 entries

«

<

1

>

»

SAVE

CANCEL



Missing or Unauthorized Service

On the navigation panel, click **Visit Maintenance**, locate the visit, open the visit details, then click **General**



Select a Visit

CREATE CALL

* indicates required field

DATE RANGE * MM/DD/YYYY

01/01/2021

to

08/12/2021

CLIENT

doe, thomas

EMPLOYEE

Enter Employee

CATEGORY

Select Category

PAYER

Select Payer

PROGRAM

Select Program

SERVICE

Select Service

VISIT STATUS

Select Visit Status

CLIENT MEDICAID ID

Enter Client Medicaid ID

FILTER VISITS BY

All Visits



Missing or Unauthorized Service

On the navigation panel, click **Visit Maintenance**, locate the visit, open the visit details, then click **General**

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status
Doe, Thomas	Doe, John	OHCW PCA (T1019)	06/01/2021	02:00 PM	04:30 PM	02:30				02:30	Incomplete

Missing or Unauthorized Service

On the navigation panel, click **Visit Maintenance**, locate the visit, open the visit details, then click **General**

Visit Details

Visit From Date: 06/01/2021

CLIENT NAME

CLIENT ID #

MEDICAID ID #

EMPLOYEE NAME

EMPLOYEE ID #

Doe, Thomas

140112

888928392839

Doe, John

GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

VISIT FROM DATE

VISIT TO DATE

VISIT TIME ZONE

VISIT STATUS

06/01/2021

06/01/2021

US/Eastern

Incomplete

CALL IN

CALL OUT

CALL HOURS

UNITS

02:00 PM

04:30 PM

02:30

10

ADJUSTED IN DATE

ADJUSTED IN HH:MM AM/PM

ADJUSTED OUT DATE

ADJUSTED OUT HH:MM AM/PM

06/01/2021

02:00 PM

06/01/2021

04:30 PM

AGENCY ID

AGENCY NAME

BILL HOURS

25090

Test p1 to p2 Agency

02:30

PAYER

PROGRAM

SERVICE

GROUP VISIT CODE

ODM

OHC

OHCW PCA (T101

CLIENT VERIFIED TIME

CLIENT VERIFIED SERVICE

CLIENT SIGNATURE

No

No

No

VISIT SOURCE

SANDATA

DO NOT BILL

APPROVED

GENERATE GROUP VISIT CODE



Missing or Unauthorized Service

Modify the payer, program, and service to match the client record, enter a reason code, resolution code, and reason note (if required), then click **Save**

The diagram illustrates the process of modifying service information. It starts with a form containing three dropdown menus: PAYER (ODM), PROGRAM (OHC), and SERVICE (OHCW PCA (T101)). A large blue arrow points to a second form where these values have been updated: PAYER (DODD), PROGRAM (DD), and SERVICE (HPC). Below this, a third form contains three more dropdown menus: REASON CODE * (40 Telephony Iss), RESOLUTION CODE * (Written Documei), and REASON NOTE (Reason Note). A blue 'SAVE' button is located to the right of these fields.

PAYER	PROGRAM	SERVICE
ODM	OHC	OHCW PCA (T101)

→

PAYER	PROGRAM	SERVICE
DODD	DD	HPC

REASON CODE *	RESOLUTION CODE *	REASON NOTE
40 Telephony Iss	Written Documei	Reason Note

SAVE

Resources

Resources

Agency Manual

- <https://medicaid.ohio.gov/static/Providers/EVV/Trainng/Phase3-Agency-Guide.pdf>

Non-Agency Manual

- <https://medicaid.ohio.gov/static/Providers/EVV/Trainng/Phase3-Non-Agency-Guide.pdf>

Provider 1-1 Session

- <https://go.oncehub.com/ODMEVVHelp>



Questions

Reach Out with Questions or Issues

EVV Provider Hotline:

For help with a device or the EVV Portal, call 855-805-3505 or email ODMCustomerCareEmail@sandata.com

Hours of Operation:

- ▶ Mon-Fri, 7am-8pm
- ▶ Sat-Sun, 9am-5pm

ODM EVV Team:

For general EVV questions, email ODMEVV@Sandata.com or leave a voicemail at 614-705-1082

For policy questions, email EVVPolicy@medicaid.ohio.gov

Alternate EVV:

For questions regarding alternate evv, email OHAltEVV@sandata.com

ODM Provider Assistance Hotline:

For help with changing contact information in MITS or claims questions call 800-686-1516

